

Overview

This job aid will help guide Approved Admin Staff through the process of adding new Agents to their Agency and provide subsequent steps to guide their new Agent through the CalHEEERS account creation process.

Procedure

Part 1 – Agent Profile Creation in Portal

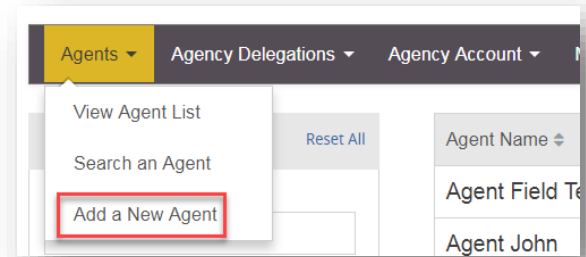
1. Approved Admin Staff logs into their Portal.
2. The Approved Admin Staff selects “Add a New Agent” from the **Agents** menu. This will advance the Approved Admin Staff to the *Agent Information* page.
3. On the *Agent Information* page, the Approved Admin Staff enters the information for the new Agent.
 - **Business Address:** This is the location the Agent will do business from and where they will show up in “Find Local Help.” If the location is not available in the **Select Agency Location** drop down, the Approved Admin Staff needs to add it by navigating to the *Agency Account* menu and selecting the **Location and Hours**.
 - From the *Location and Hours* page, the Approved Admin Staff will select “Add Sub-Site”

Note: The Approved Admin Staff cannot edit the Legal Business Name or the Federal Tax ID (Tax ID) for the Agency. If there is an issue/error, please contact AgentContracts@covered.ca.gov for additional assistance.

4. Next, the Approved Admin Staff advances to the *Profile* page, where they input the information that will display on the “**Find Local Help**” page for their new Agent. After completion, the Approved Admin Staff will select **Finish**.

[ADD SUB-SITE](#)

+ PRIMARY SITE: Sacramento Location 1601 Exposition Blvd Sacramento CA 95815	EDIT
- SUB-SITE:	EDIT



Agent Information

To apply for certification enter the following information in the fields below. Covered California will review your application for certification and will notify you once the review is complete.

First Name *

Last Name *

Insurance Agent License Number *

(Not your NPN)

License Renewal Date *

📅

Individual Email *

Primary contact number *

Business Contact Number

Alternate Contact Number

Fax Number

Preferred Method of Communication *

Email ▼

Business Name *

Federal Employer Identification Number (EIN) *

What if i don't have an EIN?

Business Address

Select Agency Location *

Sacramento Location ▼

Current Location

2329 gateway oaks parkway 108
Sacramento, CA 95818

Correspondence Address

Address line 1 *

Address line 2

City *

State *

California ▼

Zip Code *

[NEXT](#)

Add a New Agent to an Agency Job Aid Approved Admin Staff-Level 2

- **Critical:** Enter the agent's email address or Covered California will be unable to send the trainings and exams to the agent for completion.
- **Note:** The information listed here will be managed by the Approved Admin Staff. The Agent will only have the ability to view this information in their own Agent Portal. Any changes/updates must be done via the Approved Admin Staff.

5. After the Approved Admin Staff adds the new Agent to the Agency, the Approved Admin Staff will receive an *Application Complete* message and the new Agent will now show on their Agency roster with a certification status of **"Pending."**

- The Approved Admin Staff is responsible for advising the new Agent that they are required to take Covered California's Agent certification training. Covered California will email the new Agent with the Certification training within 3-5 business days.

Step 2: Profile

Provide information about you and your business for your public profile. This information will be displayed to consumers seeking application assistance.

Clients Served ?

☒ Individuals / Families
 ☐ Employers

Languages

English x

Aleut x

Product Expertise ?

☒ Health
☒ Dental
☒ Vision
☒ Life
☐ Medicare
☐ Workers Compensation
☐ Property/Casualty

Your Website Address ?

Your Public Email ?

Education

Bachelor Degree

▼

About Yourself

Upload Photo

C:\Users\CStratto\Pictures\Pi

Browse...

UPLOAD

You can upload a JPG, GIF or PNG file (File size limit is 5 MB)

BACK

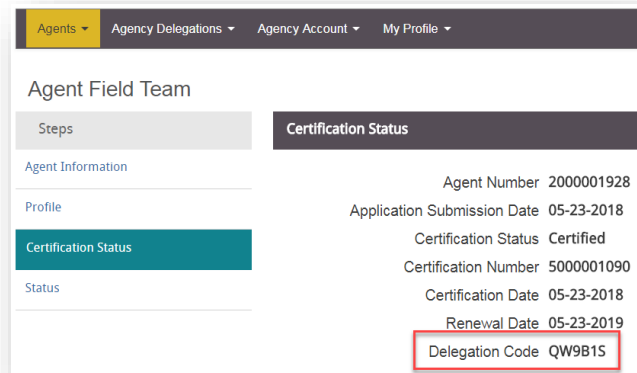
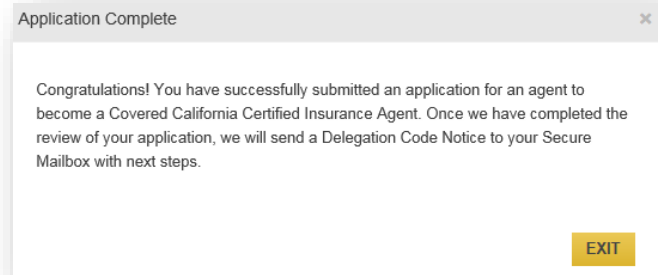
FINISH

Part 2 – Create CalHEERS Account

Once the Agent completes the entire certification process (training, passes their exam with 80% or greater, pays their endorsement fee, and signs their Agreement), Covered California updates their certification status in CalHEERS to "Certified." If an Agent is already certified with Covered California, we will review their certification status and update their status to "Certified" for the Agency.

6. Once the Agent is certified, there are two pieces of information required to set up a CalHEERS account and start assisting consumers: the Agency Legal Business Name and Delegation Code. There are two options for looking up this information.

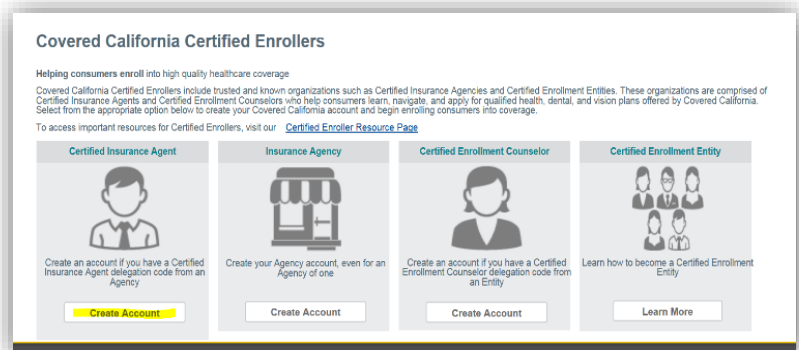
- Approved Admin Staff can look up an Agent status in the Portal. Select the **Agents** drop down and choose "Certification Status". There you will find the status and delegation code needed for new agent to create their account.
- The Approved Admin Staff will also receive an email notification to their **Secured Mailbox** when Covered California updates their new agent from "Pending" to "Certified." The Approved Admin Staff will need to access their **Secure Mailbox** to retrieve the notice, which contains important next steps for their new Agent. Note: There is no indication that a new message has been delivered to the Approved Admin Staff's Secure Mailbox. They will need to check this regularly to ensure they retrieve it.

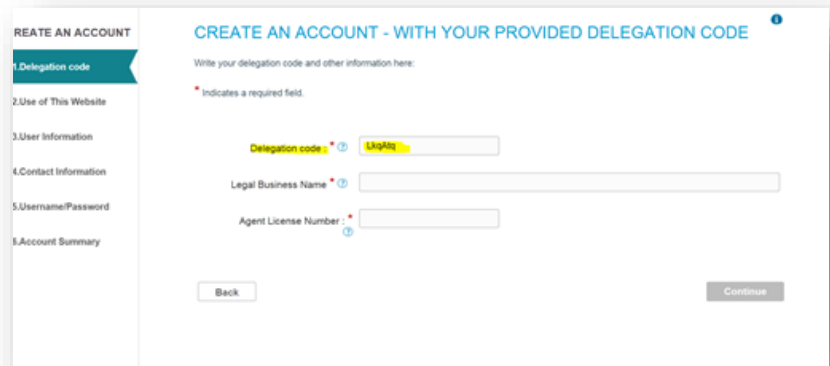
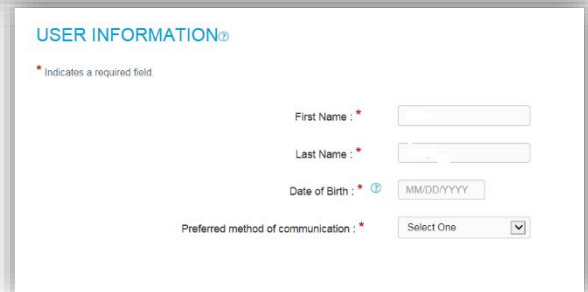
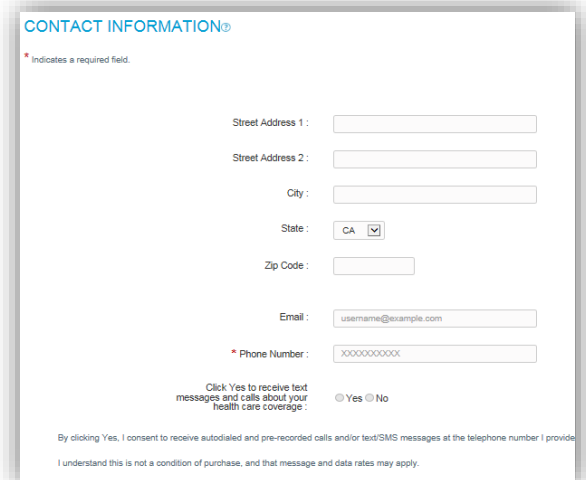
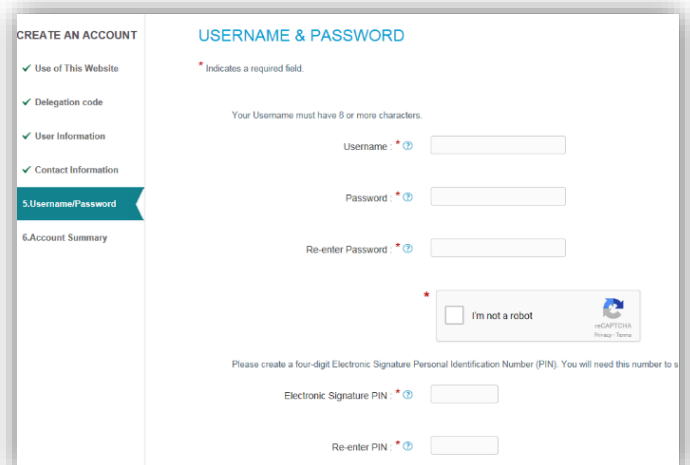
7. The new Agent will take the information received from the Approved Admin Staff and create their own individual Agent Account in CalHEERS. The Approved Admin Staff should guide them through the process. The new agent will use these two identifiers, along with their own personal Agent license number to create their new Agent account.

8. The new Agent will navigate to the CalHEERS login page: www.coveredca.com and click **Login**.

9. The agent then selects **Certified Enrollment Counselors and Certified Insurance Agents**, please [Start Here to Create an Account](#) link.



10. The new agent is then navigated to the *Covered California Certified Enrollers* page and select the **Create Account** option under the **Certified Insurance Agent** role.
11. After accepting the Terms and Conditional the Agent will arrive on a new “Delegation Code” page.
12. This page requires three pieces of information for the agent to enter. This information associates the Agent with the agency.
 - Agency’s Legal Business Name
 - The delegation code, and
 - The Agent’s license number
13. Next, the Agent advances to the *User Information* page and provides:
 - First and Last Name
 - Date of Birth, and
 - Preferred Method of Communication
14. After completing, the Agent will complete the *Contact Information* page. The agent will provide:
 - Street Address
 - Phone and/or email
 - Consent for text message notifications is only an option if preferred method of contact is phone.
15. Next, the Agent completes the *Username & Password* page by creating and entering:
 - Username
 - Password
 - Completes Captcha
 - 4-digit Signature Pin

16. After completing, the Agent will confirm the information entered on the *Account Summary* page. Once finalized, CalHEERS will display a *Create Account Confirmation* popup, and the **agent must select Login in order to activate their account and make themselves searchable in *Find Local Help*.**

